



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Fourth and Final Account and Report of Conservator, (2) Petition for Allowance of Fees to Attorney and for (3) Termination of Conservatorship

			JULIE CARTER , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need CI report regarding terminating the Conservatorship. 2. Due to the request to terminate the conservatorship, need proof of service of Notice of Hearing to relatives within the 2 nd degree.
			Account period: 01/01/10 – 12/31/12	
Cont. from			Accounting - \$90,095.36	
<input type="checkbox"/>	Aff.Sub.Wit.		Beginning POH - \$18,251.49	
<input checked="" type="checkbox"/>	Verified		Ending POH - \$4,871.58 (\$671.58 is cash)	
<input type="checkbox"/>	Inventory		Conservator - not addressed	
<input type="checkbox"/>	PTC		Attorney - \$4,320.00 (to be paid outside of the estate from the Family Needs Trust, itemized by date for 20.25 hours at \$200 - \$250/hr.)	
<input type="checkbox"/>	Not.Cred.		Petitioner states that conservatorship of the Person and Estate is no longer necessary because assets of the estate are less than \$5,000.00 and the conservatee's only income is from Social Security. Petitioner has an advance health care directive to make medical decisions for the conservatee. Petitioner requests that the Court terminate the Conservatorship.	
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail	w/		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report	x		
<input checked="" type="checkbox"/>	2620(c)			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Petitioner prays for an Order: 1. Approving, allowing and settling the Fourth and Final Account; 2. Authorizing the payment of attorney's fees; and 3. Terminating the conservatorship.				Reviewed by: JF Reviewed on: 02/12/14 Updates: Recommendation: File 1 – Lane

		TEMPORARY DISMISSED PER COURT TRIAL MINUTE ORDER 10-25-12	NEEDS/PROBLEMS/COMMENTS:
		LARRY and LIBBY JOHNSON , Maternal Grandparents, are Petitioners.	<u>Examiner notes that:</u>
Cont. from 121312, 022113, 082113		Father: TREVOR J. GREENE	<ul style="list-style-type: none"> Pursuant to Court Trial Minute Order 10-25-12, the parties agree to <u>dismiss the temporary guardianship and return the child to his mother.</u>
Aff.Sub.Wit.		Mother: EMILY MCKAY GREENE	<ul style="list-style-type: none"> The parties also agreed to participate in mediation.
Verified		Paternal grandfather: Edwin Greene	<ul style="list-style-type: none"> The Court ordered visitation to the maternal grandparents as set forth on the record.
Inventory		Paternal grandmother: Sandra Greene	<ul style="list-style-type: none"> Atty Walters was directed to reduce the agreement to writing.
PTC		Petitioners state the mother and the child have resided primarily with Petitioners since Silas was born. There were brief periods of time in which the mother and Silas resided elsewhere, but for the most part Silas has lived with and been cared for by Petitioners. Petitioners describe numerous incidents involving alcohol and state the mother would frequently leave Silas alone. She moved back in with Petitioners in June 2011 and Petitioners hired a professional interventionist. During the intervention, the mother admitted to a significant history of blackouts and admitted that she was an alcoholic and needed help. She stopped drinking for the next few weeks up until Trevor, the father, returned from deployment in Aug. 2011. Trevor was openly undermining Emily's sobriety. Emily relapsed during that time. They tried to live in Tennessee for a brief time, and an incident resulted in Emily being incarcerated overnight for assault. Emily then returned to Petitioners home in Nov. 2011. Since then, Emily does not participated in Silas' activities, missed Open House at preschool despite reminders. Petitioner Libby took the initiative to enroll Silas in preschool. It would be detrimental for Silas to be in either parents' custody for several reasons and Petitioners' home has been Silas' safe and secure environment for nearly his entire life.	<ul style="list-style-type: none"> As of 2-19-12, nothing has been submitted by the attorney; however, a Probate Mediation Agreement dated 2-18-13 signed by the parties was received. The agreement provides a visitation schedule for the grandparents.
Not.Cred.			<ul style="list-style-type: none"> At hearing on 2-21-13, the Court adopted the Probate Mediation Agreement dated 2-18-13 as the order of the Court and continued the matter to see how things progress.
Notice of Hrg			<ul style="list-style-type: none"> As of 2-12-14, nothing further has been filed.
Aff.Mail			<ul style="list-style-type: none"> <u>Pursuant to Probate Code §1602, visitation matters should be addressed in the Family Court when there is no longer a guardianship in place.</u>
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting		Mother filed Objection to Temporary Petition filed 5-23-12; Motion to Terminate Temporary Guardianship filed 8-15-12.	Reviewed by: skc
Status Rpt		<i>[Examiner has not summarized objections here as they were specific to the temporary guardianship, which has been dismissed.]</i>	Reviewed on: 2-12-14
UCCJEA			Updates:
Citation		Court Investigator Dina Calvillo filed reports on 6-7-12, 10-10-12, and 10-24-12. DSS Social Worker Jennifer Cooper filed a report on 7-20-12.	Recommendation:
FTB Notice			File 3 - Greene

(1) Petition for Final Distribution on Waiver of Account and (2) for Allowance of Compensation for Ordinary Services

DOD: 3-13-13		SANDRA L. FUNK , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner states the promissory notes were paid in full as a result of the lawsuit filed by the estate. The Court may require clarification regarding the status of the lawsuit. Is all estate litigation concluded? 2. Petitioner states creditor's claims <u>will be</u> satisfied prior to closing the estate; however, this petition does not appear to request payment of the claims. <u>Therefore, it appears the estate is not in a condition to close (Probate Code §11640).</u> Unless the proposed final order specifically provides for payment in full of the claims, additional continuance may be required to ensure claims are adequately provided for. Is there a reason the claims have not yet been paid? 3. Need Allowance or Rejection of Creditor's Claim (DE-174), including proof of service, for the four creditor's claims: - \$603.40 filed 10-28-13 by Phillips & Cohen Associates, Ltd. on behalf of Citibank, N.A. - \$4,587.83 filed 9-16-13 by AscensionPoint Recovery Services, LLC, on behalf of Citibank, N.A. - \$4,044.75 filed 7-29-13 by Intrust Bank, N.A. - \$5,668.03 filed 5-20-13 by West Asset Management, Inc., for American Express Note: If any amounts are rejected, continuance of at least 90 days is required for response. 4. Petitioner states the assets on hand are stated in Exhibit "A," but no Exhibit "A" is attached. Need assets on hand. Cal. Rules of Court 7.550. 5. Petitioner requests distribution to the decedent's three children equally; however, Decedent's will devises the entire estate to The Floyd Zielke 2013 Trust. Therefore, need amended proposed distribution. 6. Need waiver of accounting from trustee of the trust and written acceptance of trust pursuant to Probate Code §10954(b)(4). 7. If the trustee is the same person as the personal representative, need proof of service of Notice of Hearing on all trust beneficiaries pursuant to Probate Code §1208. 8. Need declaration of trustee pursuant to Local Rule 7.12.5 <u>in addition to</u> above waiver and acceptance. 9. Need order. Order should comply with Local Rule 7.6.1.
		Accounting is waived.	
	Aff.Sub.Wit.	I&A: \$534,362.68 POH: Not stated	
✓	Verified		
✓	Inventory	Executor (Statutory): Waived	
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg	Attorney (Statutory): Waived	
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Petitioner requests distribution to decedent's three children: Sandra L. Funk, Linda Strand, and Keith Zielke, equally.	
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
Reviewed by: skc			
Reviewed on: 2-12-14			
Updates:			
Recommendation:			
File 4 – Zielke			

		TEMP EXPIRES 2-20-14	NEEDS/PROBLEMS/COMMENTS:
		DEBRA SUSAN PAYNE and STEVEN EUGENE PAYNE , Maternal Grandparents, are Petitioners.	
	Aff.Sub.Wit.	Father: RAYMOND RUDY LUNA	
✓	Verified	- Personally served 1-14-14	
	Inventory		
	PTC	Mother: JENNIFER ANN PAYNE	
	Not.Cred.	- Personally served 12-30-13	
✓	Notice of Hrg	Paternal Grandfather: Joe Luna	
		- Served by mail 12-16-13	
✓	Aff.Mail	Paternal Grandmother: Henrietta Luna	
	Aff.Pub.	- Served by mail 12-16-13	
	Sp.Ntc.		
✓	Pers.Serv.	Petitioners state they have been caring for the minor since 10-9-13 when the mother left him in their care. See attached note.	
	Conf. Screen	Petitioners state the mother is a meth drug addict and is suffering from mental illness and delusions to the point that she hears voices telling her to do harm and cause property damage. Petitioner state the mother was transferred to Exodus on 11-9-13 for approx. 24 hours, and on 12-9-13, went to the Dept. of Behavioral Health Urgent Care/Wellness Center for delusions and drug use. She refused to complete the assessment and instead went to City Hall to confront the mayor for unintelligible reasons. Petitioners state the mother has stated that she hears voices telling her to get a gun and shoot herself. Petitioners state the mother received a notice of eviction on 12-3-13 and has no other place to live. They were informed that she had cut the wires in her apartment causing other apartments to be without power. The father is in Wasco State Prison.	
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice	Court Investigator Charlotte Bien filed a report on 2-7-14.	

Reviewed by: skc
Reviewed on: 2-12-14
Updates:
Recommendation:
File 5 – Luna

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS: Note: There are two orders in the file for signature: 1) Guardianship order (GC-240) 2) Order Regarding Eligibility for Special Immigrant Juvenile Status – Probate Guardianship (GC-224)
		ERNESTO A. RIVAS GOMEZ , Minor, is Petitioner and requests that his brother, JOSE LUIS RIVAS GOMEZ , be appointed as Guardian of his Person. Father: ALBERTO RIVAS AYALA - Consents and waives notice Mother: MARIA GOMEZ - Consents and waives notice Paternal Grandparents: Deceased Maternal Grandparents: Deceased Petitioner states he fled his home country of El Salvador because he had been performing dangerous child labor from age 12. He was physically and verbally abused by his employer and also by his father. He was not allowed to attend school regularly. He had no protection in El Salvador. He was allowed to travel to the US without supervision and has been living with his brother since arriving in the US (April 2013). Jose has provided him with a safe and stable environment. He is attending school and learning English. Guardianship is necessary to qualify for "Special Immigrant Status" that will entitle him to apply for lawful permanent residency. Petitioner requests the Court make the appropriate findings for qualification. See petition for details. Court Investigator Jo Ann Morris filed a report on 2-6-14.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 2-13-14 Updates: Recommendation: File 6 – Gomez

DOD: 01/29/98		DENNIS W. SNIFFIN, JAMES L. SNIFFEN, and CELESTE M. FISHER, children of the decedent, are Petitioners. 40 days since DOD. No other proceedings. I & A - \$9,800.00 Will dated 08/27/97 devises her estate equally to her 4 children. Son, Mark Sniffen, assigns his interest in the estate ½ to Dennis Sniffen and ½ to James Sniffen. Petitioners request court determination that the decedent's 100% interest in mineral interests in real property pass to them pursuant to decedent's will and subject to the assignment of interest by Mark Sniffen.	NEEDS/PROBLEMS/COMMENTS: 1. There appears to be no provision in the Probate Code for Assignments in Summary Proceedings.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF Reviewed on: 02/13/14 Updates: Recommendation: File 7 – Sniffin	

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 01/30/14</u> Partial Accounting filed 01/29/14, set for hearing on 03/04/04 Note: Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers. Note: Letters of Administration were issued to the Public Administrator on 08/01/13. As of 10/01/13, the following remains outstanding: 1. Need Final Inventory & Appraisal . 2. Need Accounting and/or Petition for Final Distribution .
Cont. from 012513, 032913, 042613, 072613, 100413, 102513, 120513, 010214, 013014	Notice of Status Hearing filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.	
Aff.Sub.Wit.	Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11 states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything. Inventory & Appraisal, partial no. 1 filed 07/24/13 - \$1,619,273.76 Clerk's Certificate of Mailing filed 10/08/13 states that a copy of the Minute Order from 10/04/13 was mailed to Larry Donaldson on 10/08/13.	
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Continued on Page 2

Report Regarding Status of Estate filed 11/27/13 states: At a hearing on 07/26/13, the Court accepted Larry Donaldson's resignation as Administrator and appointed the Public Administrator. According to the 07/26/13 minute order, Mr. Donaldson advised that the accounting was being done, however a conflict that may require another attorney to complete the work has come up. No accounting has been filed. Mr. Donaldson was not returning calls to the Public Administrator, who called him weekly on Wednesdays. He finally answered a call made from a personal cell phone. At a hearing on 10/04/13, Judge Hamilton ordered Mr. Donaldson to be present at the continued hearing on 10/25/13. Mr. Donaldson did not appear on 10/25/13. The Public Administrator advised the Court that all estate assets had been liquidated and rolled into a trust, of which Mr. Donaldson is the trustee. Despite requests by the Public Administrator, a copy of the trust has not been provided. The Public Administrator is concerned about the assets considering they have not yet been accounted for in the estate.

According to the Inventory & Appraisal filed by Mr. Donaldson on 06/24/13, the estate's value was \$1,619,273.76. The Public Administrator has not been able to access the Bank of America or Security First Bank accounts. He filed and was granted an ex parte order directing financial institutions to provide access to and information regarding all accounts held by the estate or trust of the decedent. The Public Administrator has made several attempts to locate a company whereby "Person Education Publication Royalties" are paid. According to attachment 2 to the Inventory & Appraisal, future royalties will be paid to the estate. There are two timeshares listed, and the Public Administrator has asked Chicago Title to determine the status of these properties. The real property, valued at \$750,000.00 was reportedly sold for \$600,000 and the proceeds placed into a Bank of America bank account. The Public Administrator believes that Mr. Donaldson should once again be ordered to appear before this Court to account for all assets listed on the Inventory & Appraisal that he filed. He should also be ordered to provide a copy of the Trust and an accounting of those assets to the Public Administrator.

Status Conference Statement filed 01/17/14 by Larry Donaldson, former Executor, states:

1. He retained an accounting firm to prepare an accounting for the estate in August 2013.
2. The accounting firm has indicated that they believe the accounting can be completed by 01/28/14.
3. Several months ago, he provided the beneficiaries a bank ledger showing all income and expenditures for both the Bank of America and Security First Bank accounts pending the filing of an official accounting.
4. He has provided original estate documents to the accounting firm and therefore does not have personal possession of the documents in order to be able to prepare an accounting himself.
5. He requests a short continuance to allow him to file an accounting, he believes he should be able to have it filed on or before 01/31/14.

8B Paul Harvey Wallace (Estate)

Case No. 08CEPR00294

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 01/30/14</u></p>	
Cont. from 010214, 013014			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
<p>Reviewed by: JF</p> <p>Reviewed on: 02/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8B - Wallace</p>			

8B

**Order to Show Cause Re: Failure to Provide Information to the Successor
Administrator Timely; Imposition of Sanctions in the Amount of \$800.00**

DOD: 06/22/07		<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR, was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p> <p>Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 01/30/14</u></p>
Cont. from 010214, 013014			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/12/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8C - Wallace</p>	

		JENNIFER SANCHEZ, Maternal Aunt, was appointed Guardian of the Estate on 3-6-13 without bond, funds blocked.	NEEDS/PROBLEMS/COMMENTS:
		The petition originally anticipated receipt	<u>Continued from 10-10-13, 11-14-13, 1-16-14</u>
Cont. from 101013, 111413, 011614		I&A Partial No. 1 was filed 4-18-13 consisting of personal property valued at \$17,255.00.	Minute Order 1-16-14: Counsel informs the Court that a partial I&A will be filed today. Counsel requests continuance.
Aff.Sub.Wit.			
Verified		I&A Partial No. 2 was filed 8-26-13 consisting of CalSTRS proceeds of \$5,955.33.	<u>Note:</u> a Reciept for Blocked Account was filed 1-21-14; however, a Final I&A has not yet been filed.
Inventory			
PTC		A Final I&A has not yet been filed.	1. Need Final I&A or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Not.Cred.			
Notice of Hrg		Notice of Taking Possession or Control of an Asset of Minor was filed 6-24-13 at the request of the insurance company.	
Aff.Mail			
Aff.Pub.		A Status Hearing Report filed 9-3-13 states Ms. Sanchez has received two checks from CalSTRS, which include retroactive benefits, which checks have been deposited to the blocked guardianship estate account. Receipt attached as Exhibit B.	
Sp.Ntc.			
Pers.Serv.		Ms. Sanchez has been awaiting funds from the mother's life insurance policy with Great American Life Ins. Company, which will be deposited to blocked account upon receipt. The report requested 45 days.	
Conf. Screen			
Letters		On 9-5-13, the Court reset the status hearings scheduled for 9-6-13 to 10-10-13 pursuant to request.	
Duties/Supp			
Objections		On 10-10-13, this status hearing was continued to 11-14-13. On 11-14-13, there were no appearances and the matter was continued to 1-16-14.	
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

11 Elijah & Elaina Vasquez (GUARD/P)

Case No. 11CEPR00584

Atty Hopper, Cindy (for Lisa Elizando and Abraham Elizondo Co-Guardians)

Atty Elizondo, Rebecca (pro per Co-Guardian)

Atty Vasquez, Elizabeth (pro per Mother)

Atty Vasquez, Michael Jay (pro per Father)

Hearing Re: Visitation

Elijah age: 9	<p>ELIZABETH VASQUEZ, mother, petitioned the court regarding visitation stating the guardians were not fulfilling their duties and caretakers. They were not following the court's orders which granted her telephone visitation on Mondays and Thursdays and visitation two hours per week at CYS.</p> <p>REBECCA ELIZONDO, maternal aunt, ABRAHAM ELIZONDO, maternal grandfather and, LISA ELIZONDO, maternal grandmother, and co-guardians also petitioned the court regarding visitation. In their petition the guardian's alleged the parents were a danger and threat to the children. The Family Court granted permanent restraining orders protecting the children from their respective parents, however the Family Court deferred the issue of the parents having visitation with the children to the Probate Court.</p> <p>Father: MICHAEL JAY VASQUEZ</p> <p>Minute order dated 9/12/13 from the Court Trial Re: Visitation states Judge Oliver orders continuation of therapeutic visits for ninety (90) days at which time the court continues the visitation hearing. Dr. Taylor, Dr. Punnett and CYS are to provide a confidential letter to Judge Robert Oliver regarding the progress and comfort level.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Declaration in Support of Notice of Motion to Stay Proceedings has been filed however the actual Notice of Motion has not been filed.</p>
Elaina age: 7		
Cont. from 121213		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 2/13/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Vasquez</p>		

Letter from Laura Laird, MS, Registered MFT Intern at Comprehensive Youth Services dated 11/13/13

Letter from Robert C. Taylor dated 12/4/13

Minute Order dated 12/12/13 states the Court orders that visitation continue as previously set. Father is ordered to provide the Court a progress report regarding his employment efforts and providing proof of any counseling.

Order After Hearing dated 3/11/2013 ordered:

1. Neither parent shall have telephone communication with the minor children.
2. The parents shall have separate therapeutic visitation through Comprehensive Youth Services or a comparable agency that provides therapeutic visitation with the children. All therapeutic visitation shall be arranged by the agency and/or therapeutic counselor with dates and times to be arranged by the agency and/or therapeutic counselor.
3. The children's therapists shall each provide the Court and the Court Investigator with a letter regarding the children's progress in therapy, any issues pertinent and relevant regarding the children's contact with their parents, and any other issues the therapist deems pertinent. The letters shall be provided to the court prior to July 11, 2013.
4. The mother and/or father shall provide the Court Investigator proof of any mental health treatment they are engaged in or have engaged in.
5. The parties shall not discuss the substance of this matter around the children.

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory

DOD: 3-24-13		TOM MIYAKE , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$340,867.55 POH: \$340,867.55 (cash, vehicles) Executor (Statutory): Waived Petitioner requests distribution pursuant to Decedent's will and Assignment of interest as follows: Masaji Miyake: A 1/3 interest in the various accounts, vehicles Marilyn Y. Ishimaru: A 1/3 interest in the various accounts, vehicles Tom Miyake: A 1/3 interest in the various accounts, vehicles	NEEDS/PROBLEMS/COMMENTS: 1. Need consent to distribution of accounts and personal property in undivided interests pursuant to Local Rule 7.12.3 from: - Masaji Miyake - Marilyn Ishimaru	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			
Reviewed by: skc Reviewed on: 2-13-14 Updates: Recommendation: File 12 – Miyake				

		NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		LUZ AMARILLAS , Paternal Grandmother, is Petitioner.	<ol style="list-style-type: none"> Petitioner's Request to Waive Court Fees was denied by the Court on 12-18-13 because the request was incomplete, and no additional request was filed. Therefore, need filing fee \$225.00. Need Court Investigator's Report. Need Notice of Hearing. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Heather Salem (Mother) Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Maternal Grandfather - Maternal Grandmother - Siblings age 12 or older (three siblings are listed in the petition)
		Father: REYMUNDO AMARILLAS - Consents and waives notice	
		Mother: HEATHER SALEM	
		Paternal Grandfather: Deceased Maternal Grandfather: Unknown Maternal Grandmother: Unknown	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	X	
<input type="checkbox"/>	Clearances	X	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Petitioner states the minor needs a steady home, medical care, and psychological evaluation for help with issues in school. She is not friendly at school and is at risk of failing second grade. Petitioner needs to make sure they try every avenue to help.	
		Petitioner states that if guardianship is granted, she will place the minor on her insurance so that they can find out if the minor has a learning disability and get her help.	
		Court Investigator Samantha Henson to file report, clearances.	
		Reviewed by: skc	
		Reviewed on: 2-13-14	
		Updates:	
		Recommendation:	
		File 13 – Amarillas	

14 Kaycee Renee Draper (CONS/P)**Case No. 14CEPR00025****ProPer Draper, Cynthia Lucia (pro per – mother/Petitioner)****ProPer Kelley, Sabrina Irene (pro per – mother's domestic partner/Petitioner)****Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)**

Age: 18		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		CYNTHIA DRAPER , mother and SABRINA KELLEY , mother's domestic partner, are Petitioners and request appointment as Conservators of the Person with medical consent powers.	<ol style="list-style-type: none"> The Petition is marked at item 1e requesting orders relating to the capacity of the proposed conservatee under Probate Code § 1873 or 1901 but did not specify which powers are being requested. Need more information. The Capacity Declaration of Dr. Martin is incomplete as follows: <ol style="list-style-type: none"> #4a – date proposed conservatee was last seen #5 – Ability of proposed conservatee to attend the hearing #7b – Dr. Martin did not initial item 7b. Initials are required if item 7b is selected. It does not appear that item 11 (conservatee's relatives) of the Petition is complete. All relatives within the 2nd degree (father, maternal and paternal grandparents, siblings) should be listed. Pursuant to Local Rule 7.1.1D – if a relative is deceased, their name and date of death should be stated in the petition. The Citation filed 02/14/14 is incomplete. The Person's name who is cited is blank, and item 1(b) is incomplete. Further, the proof of service on the back page indicates that the Citation was served on Kevin Draper. It is unclear who Kevin Draper is; the Citation is to be served on the proposed conservatee (Kaycee Draper). Need <i>Notice of Hearing</i>. Need proof of personal service on the proposed conservatee at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the Citation and a copy of the Petition. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the Petition for: <ol style="list-style-type: none"> Donna Losurdo (grandmother) All other relatives within the 2nd degree (father, maternal and paternal grandparents, siblings) Need CI report (CI to provide).
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Declaration of Merle Martin, M.D. filed 01/10/14 supports the request for medical consent powers.	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory	Petitioners state that Kaycee is intellectually disabled and requires assistance in activities of daily living. She is not able to provide for her own needs of housing, food, etc.	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Court Investigator Samantha Henson filed a report on – NEED REPORT.	
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 02/13/14
			Updates: 02/14/14
			Recommendation:
			File 14 – Draper